

## **Planned Progress Report - Instructions**

- (1) The planned progress report is required only at the beginning of a reappraisal as a part of the reappraisal plan.
- (2) The monthly breakdown on the planned progress report represents work scheduled from the 20<sup>th</sup> of the previous month through the 19<sup>th</sup> of the current month.
- (3) Place a check mark next to either "Phase 1" or "Phase 2" at the top of the page.
- (4) Do not include exempts as part of planned progress.
- (5) A breakdown by city or township-range is sufficient for Phase 1 of the planned progress report.
- (6) A geographical area that takes more than one month to complete needs no further geographical breakdown for each month but a per month projected total is required.
- (7) A breakdown by city or township-range is not required for Phase 2 of the planned progress report. However, a per month total is required.
- (8) "Number of Parcels" during Phase 1 refers to the number of parcels each month for which data collection, any necessary follow-up review, and the resulting data input is scheduled to be complete. Do not enter anticipated totals for data collection only or data collection/review only.
- (9) Completion of Phase 1 must be scheduled no later than April 19<sup>th</sup> of the valuation year.
- (10) "Number of Parcels" during Phase 2 refers to the number of parcels each month for which valuation and corresponding entry into the CAMA system is scheduled to be complete. This includes lot values, location factors, and soil coding where applicable.
- (11) The Phase 2 schedule can begin at any time during the reappraisal and can be broken down per month by segment, such as lot valuation or location factor analysis. However, totals should only be entered when parcels are scheduled to be Phase 2 complete. For each property type, valuation must be complete for at least 50% of the parcels, subject to minor revisions, by April 19<sup>th</sup> of the valuation year. Final values shall be made available for placement on the assessment rolls by July 1 of the valuation year.
- (12) Data collection/review and data entry for agricultural use parcels is considered complete when data collection/review and data entry of improvements has been done. Use determination can be made on site and/or with up-to-date aerials and is considered part of the valuation process for audit purposes.
- (13) Use the "Other Tasks Planned" column to describe work such as "Setup", "Maintenance Only", or "Lot Valuation". No totals are needed for these tasks. Include "Soil Coding" if dates are different from planned geographical progress.
- (14) Please enter the overall Phase 1 (or Phase 2) total on the last row of the last page of each phase, in the "Number of Parcels" column. Label it "Phase 1 Total" or "Phase 2 Total", using the last row of the "Geographical Area" column. Phase 1 and Phase 2 totals should match.